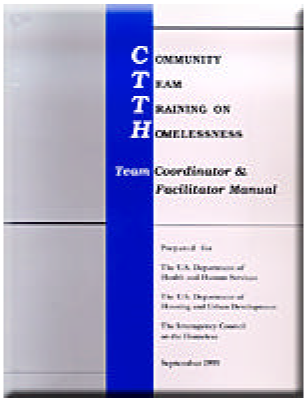

Community Team Training on Homelessness
Team Coordinator & Team Facilitator Manual

Prepared for The U.S. Department of Health and Human Services The U.S. Department of Housing and Urban Development The Interagency Council on the Homeless September 1999

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Chapter 1
Introduction

This manual is designed to help you assist your team to formulate a plan for integrating housing, treatment and supportive services for homeless people in your community who have multiple diagnoses. It is also intended to help you initiate and sustain the type of teamwork needed to create a plan and implement it.

The manual identifies separate roles for a team coordinator and facilitator and provides material for both those roles. This manual is a companion to Community Team Training on Homelessness (CTTH): The Team Members' Manual. The ideas and suggestions that make up its contents parallel the information in the members' manual. This manual is akin to a "teacher's guide," as it contains suggestions for how best to assist those working with the actual text. The members' manual is the fuller representation of CTTH; it contains the concepts, exercises, templates and expert information needed to build a team and a plan of action. It is suggested that you first read the members' manual before reading this manual.

Using the Manual in Combination with the Members' Manual

The Community Team Training model has been used with more than 50 teams from all over the country.1 The ideas and suggestions included in this manual are drawn from the experience of watching these teams develop and function. Many of the team coordinators and team facilitators provided feedback on what they found useful.

For the sake of clarity, the ideas and suggestions in this manual are stated as things to do or steps to be taken in a certain order. However, this manual is not meant to be followed precisely — not every idea or suggestion will benefit your team. Instead, take the ideas and adapt them to fit the needs of your team.

Most of the specific ideas and suggestions in this manual can be found in Chapter 3 (Team Building), Chapter 4 (Action Planning) and the Appendices of the members' manual. Therefore, as you encounter a need in these two areas you will be able to find the content you need in the members' manual and the process suggestions in this manual.

Example: Your team is newly formed. Some team members already know each other fairly well; others are known only by name; two are new — they know no one on the team. You want to make sure the team does not break into subgroups by virtue of prior relationships. It's important for this team to start together and to get to know each other.

Therefore, you note the suggested exercises in Chapter 3 and the Appendices of the members' manual and select two for a first gathering. You turn to Chapter 5 in this manual and find suggestions on how to use those exercises to get off to a good start.

Roles on a CTTH Team

A CTTH team has three roles:

- team coordinator
- team facilitator
- team member

The team coordinator and team facilitator are team members first. They have taken on special roles in addition to their basic roles as team members.

In the earliest stages of the team's existence, the team members are somewhat dependent on the initiative of the team coordinator and, to a lesser extent, the team facilitator. But as the team develops, it is expected that "shared leadership" among the members of the team will emerge. By shared leadership, it is meant that each member of the team takes full responsibility for the success of the team. This means that each member participates fully, suggests improvements, challenges the team when needed, and supports the agreed upon ground rules. So, while there is one designated team coordinator, each member is expected to think like a team coordinator to see that the team succeeds.

This manual is written for the team coordinator and/or the team facilitator. The "and/or" refers to the fact that sometimes the team coordinator is also the team facilitator. Sometimes a clear division of labor exists between the team coordinator and the team facilitator, while other times the roles are blurred with the team coordinator occasionally taking on the facilitator's duties. Teams also have developed shared leadership among members, to the extent that the roles of team coordinator and team facilitator were no longer clearly assigned to one person. As with all aspects of this process, it is a matter of finding the approach that best fits your particular team.

Chapter 2
Team Coordinator

The person who secures the CTTH materials and stirs interest in the process is by default the team coordinator, at least temporarily. Later, once the team is launched, a new team coordinator may be named. Most often, though, the initial team coordinator continues to serve the team in that role during the first year of the team's existence and beyond. One of the hallmarks of successful teams in the past has been a strong team coordinator who has held the role for at least the first year of the process. The team coordinator has a few unique responsibilities. They include:

- Identifying the problem of fragmentation in the community, its consequences, and CTTH as a possible route to a solution
- Informally generating interest to jump–start the process
- Recruiting team members
- Securing the services of a team facilitator
- Filling other roles as need arises
- Chairing team discussions
- Establishing and supporting positive team ground rules
- Managing the CTTH process

Informally Generating Interest to Jump-start the Process

The most critical moments of the CTTH process can occur before the process appears to have begun, when you raise the possibility of engaging in CTTH. Begin by introducing the possibility of a CTTH as just that — a possibility. This way you can build shared ownership. Don't push the idea of CTTH too aggressively; you run the risk of CTTH becoming your project and buy–in will be more difficult.

Next, talk to key individuals to get their support. It is not only a courtesy, but it gives people time to get over quick reactions and see the potential of CTTH. But don't drop the idea on others without giving them time to think about it, or else it will probably be rejected.

Finally, generate conversations about the need for collaboration and integration and the costs of not doing so. Be careful not to push CTTH by name at the outset — it reduces CTTH to the status of a "program du jour." It is better to highlight the needs rather than push a program.

Recruiting Team Members

The responsibility of getting the right people on the team has the greatest bearing on the future success of the CTTH process. The right mix of skills and knowledge is important, but you also need to pay attention to the reputations of those who make up the team. It is easier for a highly respected team to succeed than a group of lesser–knowns. People will first want to know who is on the CTTH team. If they perceive that the team is composed of effective and highly respected individuals, the team and the process gain instant credibility. Any time you invest in securing the best possible team will be time well spent.

The following questions should be considered when composing the team:

- Is the prospective team member a widely respected community member?
- Is the prospective team member a decision-maker/change agent?
- Is the team member’s track record a good one?
- Are multiple disciplines in the service delivery community represented?
- Are the key agencies involved?
- Does the team reflect the diversity of the community?
- Are the participants and their agencies showing a high level of commitment?
- Does each team member have the support of his or her agency?
- Will the team be able to work together?
- Does the team collectively have the skills needed to work a CTTH process?
- Does the team have at least one member of the team with evaluation skills to ensure a competent evaluation of the CTTH process and its outcomes?
- Does each team member have the time to commit to the CTTH process and to make it a high priority?

How big should the team be? Several considerations should be kept in mind when determining team size.

- The team should be large enough to handle the work load. A team that is small in number and consequently overloaded will have a hard time over the long haul.
- Teams should not be so large that basic cohesion is impossible to sustain. Teams whose members do not get to know each other invite internal problems and miscommunication.
- Teams should be small enough to make it possible to have a common schedule. Teams that always have members absent due to scheduling conflicts tend to bog down.
- Teams should be large enough to adequately represent the area being served. Teams that fail to be inclusive run the risk of not having support and buy-in throughout the community.
- Teams need to be small enough so each member feels his or her presence and contribution makes a difference. Teams whose members get the idea that they can miss meetings or be late with promised work because so many others are on the team will become inefficient and ineffective.

In the past, teams have erred on the side of being too large. Most often this happens at the service of being inclusive. That is, in order to make sure “everyone has a place at the table,” each group is offered a spot on the team. Initially this works because it sends a good signal about inclusiveness, but in the long run it can impede effectiveness. The question becomes: How can you balance the need for efficiency and accountability with inclusion?

One suggestion is to establish a team of about six to 10 members. A group that size tends to have the right balance of size and accountability. This will be your primary work group.

Then establish an advisory group, which can be as large as you like. This group provides guidance to the planning team and serves as a communication link to the wider community.

Securing the Services of a Team Facilitator

The purpose of having a team facilitator is twofold:

- to ensure high quality team-building experiences and high quality action-planning sessions;
- to allow the team coordinator to function during the team-building process as a team member.

Is it necessary to have an outside team facilitator? Strictly speaking, the answer is "no." Some teams include a person with facilitation skills and when the need arises they serve in that function. It does limit that individual's participation in the team–building exercises, but it does not exclude them altogether. Some teams prefer not having an "outsider" present.

How well have team facilitators worked in the past? The experience of teams who have used a team facilitator has been very positive. The concern about having an "outsider" in team discussions has not materialized. Obviously, it is important to select someone who is skilled, so the process of selecting a facilitator is worth spending some time on. Also, if you intend on using a facilitator more than once, get the same person each time, assuming he or she does a good job.

What are the advantages of having a team facilitator? During the team-building sessions, the main advantage is that it frees the team coordinator to function as a team member. The main advantage during the action-planning sessions is the order a good facilitator can bring to what might otherwise be a rich but cluttered conversation. A hidden benefit of an outside facilitator is the ability of the facilitator to serve as a consultant to the team coordinator; the ability to offer an objective point of view on how the CTTH process is proceeding and how the team is functioning. Such a relationship is not guaranteed when a facilitator comes into the picture, but when it does occur it is very valuable.

How does one find a team facilitator? Fortunately, teams in the past have reported that this has not been difficult. People who work in social services often have facilitating skills. It is likely that a team member will be able to recommend someone. Another place to check is a local college or university. (See the section on the skills a facilitator should possess on page 13 for guidance on the search and final selection of a facilitator.)

Filling Necessary Roles as Need Arises

It is the team coordinator's job to ensure that people are recruited for the team. The team coordinator doesn't have to single–handedly do the recruiting, but instead needs to ensure the team has the resources it needs.

During the early stages of the team's work, it may be necessary to recruit experts to help the team better understand the community and the needs of homeless people with multiple diagnoses. For example, the skills of an urban planner or demographer may be needed to understand the community. Typically, the expertise to understand the needs of the homeless people with multiple diagnoses is already within the group.

Teams frequently need help gathering information. If the group wishes to conduct a survey, a person with survey construction and survey interpretation skills may be necessary. Along those same lines, teams have needed to make sense of complex data, therefore a statistician or a person with similar skills may become necessary from time to time.

Program evaluation is one of the most important skills on the team. Past experience has taught that program evaluation is done best when it is integrated into the design of the team's goals. Consequently, it is recommended that the team include a program evaluator. If having a program evaluator as a full member of the team is not possible, it will be necessary to secure the help of an evaluator from time to time. Teams have had good experiences with university–based program evaluators. Quite a few have had masters or doctoral students conduct the evaluation as part of their academic work — the quality of the work is high and the price is right.

Chairing Team Discussions

"Chairing" is different than facilitating. Chairing encompasses the full range of activities that go into ensuring team meetings are well run, including:

- consulting with team members in the creation of meeting agendas;
- ensuring each member has an agenda prior to meetings;
- seeing that meetings are properly facilitated;
- ensuring meeting minutes are published in a timely fashion.

These responsibilities are not unusual or glamorous, but they are necessary and it is fair to say that the most successful teams have had the benefit of well–run meetings. Teams that have struggled have said their meetings got sloppy and unproductive.

In some cases, the breakdown of meetings can be viewed as an effect rather than a cause of problems. For example, a team that suffered an abrupt loss of three team members — one of which was the team coordinator — canceled two meetings due to poor preparation and were unproductive when they finally convened. After that, people began missing meetings and things went downhill from there. Effective meetings are a good barometer for a team's health. The team coordinator is well–advised to invest time in ensuring the meetings are both effective and efficient. When a team is functioning well, good meetings sustain its positive energy and build norms that help prevent breakdowns. If the team is struggling it becomes all the more important.

Establishing and Supporting Positive Team Ground Rules

The discipline of running good meetings is straightforward — the tasks can be listed and they have a predictable cycle. Supporting positive team ground rules is more opportunistic in nature; the team coordinator must recognize the moment when it would be helpful for the team to reflect on how it is functioning.

Fortunately, the team coordinator has a clear starting point for this job. One of the team–building activities recommended (see members' manual Chapter 3) is specifically intended to help the team establish the ground rules it will abide by. Once the team has established its ground rules, it is the team coordinator's job to make sure the team lives up to them. In truth, any team member is entitled to raise a concern if a team norm is violated. But in actual practice, this responsibility falls to the team coordinator, especially in the critical early phases of the team's development. Later, when the team is more mature and shared leadership is established, it is not unusual for any number of team members to assume this part of the team coordinator's role.

Unlike running meetings where the task is easily broken into specific parts, supporting team ground rules is better explained through example, such as the following:

Team A. One of the ground rules that Team A established in an early team-building exercise was the expectation that the team be inclusive and diverse. Early on, the team recognized the need to recruit more Hispanic members — there were none who agreed to be on the team as it was originally composed, and the community had a substantial Hispanic population. After six months, no new Hispanic member had been recruited. The team coordinator recognized this and made the issue the top priority of the team's agenda for the next meeting.

Team B. When team members were being recruited for Team B, it was always mentioned that although the work of the team was above and beyond their regular work responsibilities, it had to be treated as a high priority. This meant that assignments had to be completed on time and that communication had to be handled professionally. Despite such clear expectations, the team had lapsed into the habit of arriving at meetings with excuses for not being able to complete tasks and even the simple matter of returning calls was not happening. What the team had feared would happen was happening. The team coordinator wanted to re–state the team ground rules without engaging in a de–motivating, blaming conversation about the team's shortcomings. She set aside time at the next meeting to "review team ground rules" and made sure each team member got a copy of the ground rules that were already in place. Team members were asked to come prepared to reaffirm ground rules they found helpful, revise or drop ones that were not helpful, and propose new ground rules. By setting the conversation in the forward–looking mode, it made it easier for the team members to acknowledge past problems. The meeting concluded with renewed commitment to the ground rules and a positive feeling. The team coordinator closed by asking for a suggestion on how she should proceed if a ground rule were to be violated in the future. The team asked that she pull people aside privately and have a heart–to–heart conversation when she thought it necessary. This gave the team coordinator the kind of permission she needed to act early if she saw backsliding.

Team C. Team C endorsed a norm of “shared leadership” early in its development. For the team coordinator, this meant she could look forward to an even division of labor and that eventually others would assume the role of team coordinator after her term was complete (the length of her term was never discussed). As time went on, the work was shifting slowly to a small core group in the team and within that core group the team coordinator was doing the lion’s share. Phone calls to individual members to request they assume more of the team’s work were increasingly met by explanations of heavy work loads. The team coordinator sensed a potential breakdown in the team. She could no longer continue doing that amount of work. If she resigned, it seemed likely that the team would fold. She initiated a round of one–on–one conversations, placing her concerns before each member. She discovered that many of the others understood “shared leadership” to mean they were free to suggest ideas and set the direction for the team, but they did not imagine they would assume a special role on the team. In the end, several team members recommitted to the team with a clearer understanding of what they were to do; two resigned on good terms hoping they could return in the near future; and three new members were recruited. The team coordinator stayed in her role, but announced she would step down in six months and prepare someone to take over the role. The team went on to function in a manner that more truly reflected “shared leadership.”

In each of the above examples, the team’s ground rules act as an early warning system for the team coordinator. They are an expression of what the team expects and when the reality departs from an expectation to the degree that a problem is developing, the team coordinator can call the team’s attention to the fact.

One final example highlights another way the team coordinator supports positive team ground rules. The first three examples were triggered by a problem situation. In this example, the team coordinator uses a positive experience to support a team norm. There are advantages to doing this:

- norm is supported before there is a problem;
- by highlighting a success, the team’s confidence grows and the bond among the members is strengthened; and
- it provokes less anxiety.

Team D. Team D committed itself to working on the basis of facts rather than assumptions. At the time, this was accepted as a team norm no one had strong feelings about. It was the kind of norm that sounded like endorsing an obvious good, like fairness or honesty. But during the team’s action planning, it became clear that the group was divided on how they viewed the effectiveness of the transitional housing program that was in place. Instead of arguing the matter, a small fact–finding team was commissioned to establish certain facts. This was done and the planning continued in light of what had been learned. It was at this point that the team coordinator asked the group to reflect on how what could have been a divisive issue had been handled and how their team norm had served them well in this case.

Managing the CTTH Process

At the very outset of the CTTH process, the team coordinator does a great deal. As time goes on, many responsibilities can be delegated. However, even after they are delegated, the team coordinator remains responsible. The team coordinator will either do these tasks or see they get done by someone else. Following is a partial list of the tasks that must get done:

- make a list of team members' phone numbers, fax numbers, e–mail addresses;
- work with the team to create a CTTH calendar that includes events, meetings, places, times, etc.;
- prepare for meetings, including the supplying of beverages and food, if necessary;
- create a bank account to manage funds if they become available;
- establish financial procedures;
- secure secretarial help;
- write thank–you notes.

The list could go on and on. The point is that many small, practical tasks are key to the process. As you become aware of them, it is the job of the team coordinator to make sure they receive adequate attention. Like the ball bearings of a wheel — which are not seen — if these small touches are ignored events will not roll smoothly. some time to get to know one another a bit better. I have a way of doing that which can make it easier ...", rather than saying, "Let's start by doing some team building ..." The first approach puts the exercise in a natural context whereas the second approach tends to put people ill at ease.

The Importance of the Facilitator's Role

The role of the facilitator is important because the facilitator has a special responsibility to help the group remain true to the ground rules it has agreed will govern the team's efforts. Each member of the team is entitled to hold the team accountable if a norm is violated but in practice this often falls to the facilitator and team coordinator, especially in the early stages of the team's existence. When the team is functioning well, the facilitator is barely noticed. Indeed, some people might wonder if a facilitator is really needed. But, when there is a problem, the facilitator becomes critical.

Chapter 3
Team Facilitator

The team facilitator serves the team by helping facilitate team meetings. Specifically, this means facilitating team–building. While the team coordinator chairs the team meetings, the team facilitator pays attention to group processes and the effective involvement of everyone on the team.

In many teams, one person assumes the roles of team coordinator and team facilitator. Many teams have functioned quite well with this arrangement, but there is the danger of the team coordinator becoming overburdened. Having two people concerned with the design and running of team meetings goes a long way to avoiding this problem. That said, many successful groups have had one person handle both roles.

The role of the facilitator is important because the facilitator has a special responsibility to help the group remain true to its ground rules. Each member of the team is entitled to hold the team accountable if a norm is violated, but in practice this often falls to the facilitator and team coordinator, especially in the early stages of the team's existence. When the team is functioning well, the facilitator is barely noticed. Indeed, some people might wonder if a facilitator is really needed. But when there is a problem, the facilitator becomes critical. The team facilitator's responsibilities include:

- preparing for and helping to run CTTH team meetings; and,
- achieving the goals of team building.

Preparing For and Running Meetings

It is presumed that a person who has been asked to serve as a facilitator has basic skills on how to run meetings. CTTH team meetings are like all other team meetings in that they require a properly ordered agenda, a sensible allocation of time, good discussion, and a succinct record of what was decided.

CTTH teams, because the members come from different organizations, have some special needs that the facilitator can address.

Be Sensitive to Organizational History and Politics. CTTH team members can come from organizations that have a history with each other. In some cases, the history is one of cooperation and in other cases the history is marked by misunderstanding. Also, the present politics among those serving homeless people with multiple diagnoses has to be kept in mind.

The facilitator is cautioned to “make haste slowly.” That is, to find a right balance between helping the team get its work done without conducting a meeting like it is a forced march. Hopefully, much of the old baggage that might exist in a community can be discarded during the team–building stage. But it is probable that team members from time to time will find their differences reemerging. Suppressing significant differences because there is too little time and a full agenda is unwise.

Maintain Continuity and Momentum. CTTH team members are working together in addition to their regular jobs. The agencies they work within do not share a common calendar. In some cases, distance from each other creates a challenge. All these practical realities can erode team continuity and momentum.

The facilitator is encouraged to work with the team coordinator to establish a team calendar that stretches well into the future and to get all members to agree to those dates against all other demands. The date and time of team meetings should be set so the travel demands and likelihood of preemption is low.

The facilitator may be asked to generate the minutes of the meeting. If that is the case, it is important for the minutes to be published soon after the meeting. If the facilitator is not in charge of the minutes, it is important that whoever is be assisted in whatever way is necessary to get them out in a timely manner. Naturally, the minutes should be formatted in a way that balances the need for a complete record with brevity.

Sustain Both Productivity and Team Morale. A CTTH meeting should be both productive and enjoyable. If it is productive but a joyless grind, it will suffer. If it is fun but not productive, it will come to be seen as a waste of time and attendance will decline.

Productivity comes from the efficient running of the meeting. Team morale comes from being productive and from enjoying the shared experience of the team members. There should be time for story-telling and for celebrating the team’s successes. The meetings should be held in a comfortable space and refreshments should be available.

Sooner or later a team member will fail to complete a task that was committed to at a previous meeting. How this is handled is important. If it is ignored or passed off as no big deal, the team sets a dangerous norm of not meeting commitments. On the other hand, morale would suffer if a team member is held accountable in a way that is embarrassing. The facilitator has several options. First, this very scenario can be discussed during the team–building session on the ground rules of the team. That way the team can agree together how the situation should be handled. Second, working with the team coordinator, team members can be contacted some time prior to a meeting to inquire about the progress made on the previous meeting’s commitments.

Team members who are at risk of not meeting their commitments can be encouraged to get to work. Many problems can be headed off by timely check–ins. This practice can also be part of the ground rules discussion. Finally, in the event a team member is going to fall short, encourage the member to devise an alternative plan to present to the team.

Adopt a Style of Facilitation that Fits the Team. Every good facilitator does this, but it is so important it warrants mention. Sometimes the facilitator will be selected with a certain team in mind. In such a case, the team coordinator, knowing the personalities of those who will be on the team, may make an informed guess about what style of facilitation will be needed. Is the style needed very businesslike or more of the community–building type?

Often teams will know exactly what they need and will say, “We need somebody to keep us on track. We head off on wild digressions and waste a lot of time,” or, “We want you to make sure we don’t sidestep the hard issues.” The facilitator should listen carefully for these messages. But it can be handled more directly. After one or two sessions, it is wise to ask for feedback. For example, the facilitator can ask, “If all our meetings went like the last two, would everyone be satisfied with that? What modifications would you like?”

A facilitator may find the style of facilitation needed for the initial team–building sessions is different from that which is needed for subsequent team meetings. Typically, the style needed for the initial team building is more energetic and upbeat. The style needed at subsequent meetings moves a step or more in the direction of being businesslike.

Achieving the Goals of Team Building

Ultimately, the design and implementation of the team–building sessions is left to the discretion of the team facilitator and the team coordinator. This manual provides a few exercises that could be used in building a team, but feel free to use any other exercises that you feel would benefit your team. There are many ways to accomplish the goal of helping a team get off to a good start.

Goals. Setting aside the specific techniques, what does the team need in order to say that they are off to a good start?

- Members should come to know each other — what they do, something about their agencies and a certain amount of personal information.
- Members should share their hopes/fears for the CTTH process.
- Members should articulate the skills and knowledge they bring to the team.
- Members should articulate their ground rules, especially how they intend to make decisions.

Start with an Overnight Session. If the team has the opportunity to go off–site and have an overnight stay at a hotel or other facility, this would allow for informal conversation over meals. Most groups benefit from this type of activity. It is difficult to arrange such an event given the complexities of people’s lives. And, of course, there is the matter of expense.

All that notwithstanding, the advice offered here is that an overnight stay is optimal and two nights are better than one, especially as this allows for a jump–start on the team’s planning. It greatly enhances a sense of the team as a real entity and seems to create a better bond among the members.

It is not unusual for such an event to be planned and to learn that one or more members of the team cannot make it due to scheduling conflicts. If you are missing only one member and that person is well–connected to the others, you might risk going ahead with the event even though the whole team would not be there. But if the number of those who cannot make it rises and those that cannot make it are strangers to the others, it can create a lasting gap between those who go on the team–building event and those who do not. You might be better advised to wait until you can assemble the entire team.

Though the idea of an overnight session is mentioned here in connection with team building, it is possible to use the time to make a good start on action planning. This is especially true if the team has worked together before and has a solid grasp of the community's needs and resources. If this is the case, the team can accomplish much in terms of assessment and goal-setting.

Team Building Over Time. Team building does not have to be done once and for all at the outset of a team's existence. A certain amount of team building needs to occur at the beginning, but it is quite possible for a team to do a bit of team building at some of its early meetings rather than go through all the exercises on a weekend. The facilitator and coordinator could make room in the agendas of the first several meetings for some team building.

A Natural Approach. The worst thing a person telling a joke can do is to announce before they start that they are going to tell a joke and that you will find it to be very funny. Similarly, a team that is told that they are going to engage in team building may become self-conscious of the fact and the exercises may fall as flat as the pre-announced joke.

It is best for the team building to be experienced as a natural event. For example, the facilitator can help the team enter the team building by saying, "Before we dive into the work of our team, let's take some time to get to know each other a bit better. I have a way of doing that which can make it easier ...", rather than saying, "Let's start by doing some team building ..." The first approach puts the exercise in a natural context, whereas the second approach tends to make people ill at ease.

In addition, one of the critical benefits of the exercise is the debriefing within the team that occurs once the exercise is over. Sharing insights and interpretations with each other and using the safety of an exercise as an analogue for real–life situations helps the team understand individual approaches. The facilitator needs to give time to this process and guide the members through it.

Chapter 4
Successful Teams and
the Roles of Coordinator and Facilitator

The practice of training community teams to address community problems has been in use for a long time. The CTTH model has been used with 50 teams in recent years and some follow–up study has been done with 40 of these teams. As a consequence, there is some experience to draw about the roles of the coordinator and facilitator, especially in the early stages of the CTTH process.

Getting Started as a Team

Word of the opportunity to launch a CTTH process in a community may arrive in any number of ways. There are official and informal avenues of information and the availability of these materials may be announced in either. Word of mouth is one possibility. The community of people who work with homeless people with multiple diagnoses is well–networked and it is possible that those who have used the CTTH process could mention it at a conference or simply via e–mail. The possibilities for how word about CTTH could spread are numerous.

The next step is for a person to secure and distribute the materials — viz., a sample of the members' manual. Once an interested party comes into possession of the CTTH manual and they choose to go forward, a number of things can be done. How they are done can prove very important to the future success of the process. At this point, the person who is bringing the possibility of starting a CTTH process to the attention of others is by default the team coordinator.

Make Inquiries with Like-minded People to Gauge Their Level of Interest in the Process. Where there are existing coalitions of people serving the needs of the homeless people with multiple diagnoses, the possibility of a CTTH process may be announced at a meeting with the understanding that a team will be formed if the decision is made to enter the process. It is unwise to extend an open invitation for spots on the team, as in, "Anyone interested in being on the CTTH team, contact ..." The composition of the team is a key element in its success and cannot be left to chance. Also, by casually extending the invitation, there is a message sent that a place on the team is not prestigious and can be had for the asking.

When no coalition exists, it is suggested that the coordinator contact people individually or in small groups. Proceeding quietly and carefully allows for the development of a basis of support owned by the whole community. If CTTH were to become associated prematurely with one person or one agency, it could be misinterpreted by others. Once all key players have been consulted and there is a solid basis of support, a large group meeting can be held to explore the CTTH process in more detail.

Most people, when asked to become part of the team, will properly ask a number of questions — What is the CTTH? How does the CTTH process work? What is my role as a member of the team? Chapters 2 and 3 of the members' manual can answer these questions. You may find it helpful to photocopy these pages or develop a summary and give them to prospective team members.

Establish Agency Support. After identifying the agencies that would be involved and securing a contact person within each, the team coordinator begins the process of securing agency support and buy–in. Sometimes the buy–in will be tentative, that is, an agency will be supportive of the broad notion of better coordination among service providers but will withhold official support until there is a clearer idea of what the CTTH process will produce. That support is sufficient to initiate the CTTH process. In the case of the team coordinator, there is the hope that the person's agency support will be more enthusiastic. For example, it is helpful if the team coordinator can count on the agency to provide meeting space, photocopying, and a willingness to let the coordinator do some of the CTTH work on agency time.

Recruiting Team Members. The importance of this step cannot be overestimated. The questions to use in the recruiting and selecting of team members have already been mentioned (see page 4).

Avoid being in a position where an agency assigns a junior person to be on the team. To prevent this from occurring, the team coordinator should meet with senior members of the agency or convince its boss to express that this team must be composed of people with the authority to represent the agency and make commitments for it.

Selecting a Team Coordinator

Initially the team coordinator is self–selected. That is, the person who exercises the initiative needed to promote the idea of starting a CTTH process and to get the team composed is by default the team coordinator. It cannot be otherwise. But that does not mean that this individual must stay in the position of team coordinator. Someone else can be selected once the team is composed.

Selection Criteria for a Team Coordinator

A team coordinator should possess:

- the respect of the team and the wider community; at a minimum does not have a history as a divisive person;
- good political skills;
- understanding of the CTTH process;
- the ability to keep a large, high–energy group on task;
- the skill to manage a complex set of issues;
- a well–timed sense of humor when the going gets tough;
- good planning skills;
- upbeat attitude and good communication skills;
- ability to manage both the demands of a regular job and the CTTH process;
- strong support from his or her employer;
- the ability an serve in the capacity of coordinator for at least one year.

Who selects the facilitator? The coordinator makes the selection, often in consultation with one of the other members. A member of the team may know someone who is good at facilitating and arranges for this person to meet with the coordinator.

The facilitator might be someone who is already a member of the team. This is often the case and has worked well in the past. There are some concerns about the facilitator being unable to participate in the team–building sessions. And if there is a time when the need for a facilitator is due to team differences, the within–team facilitator may be compromised by being seen as on one side or the other.

The outside facilitator has the advantage of being a true third party and his or her facilitation will not be interpreted to favor one point of view. If the outside facilitator is adept at team building, it can be an advantage as it allows all the team members to be participants. Over time, the outside facilitator will not know the team as well as an insider. Having an outside facilitator also may add some expense.

Past experience has not indicated that having an outside facilitator is related to team success. Successful teams have handled the role both ways.

Selection Criteria
for a Team Facilitator

- Selection Criteria for a Team
- Meeting planning skills
- Strong interpersonal and small group communication skills
- Ability to think quickly and adapt to a changing situation
- Ability to generate accurate, succinct meeting minutes
- A good fit with the group in terms of personal style
- Experience or training in facilitating

Chapter 5
Team Building

The purpose of this section of the manual is to offer the team facilitator some advice on how to use the exercises in the members' manual. It is also relevant to the team coordinator. Four exercises are in the members' manual - The Gifts I Bring; The Connections I Have in the Community; Conditions I Value in Building a Collaborative Climate; and Team Ground Rules. These exercises can take a team from not knowing each other well to a point where they begin to enter the planning process. As was mentioned earlier, these are not the only team–building exercises, and others can be substituted that may also do the job. These are included as a courtesy in case the facilitator would like to use them.

Assessing the Team–Building Needs of the Team

Teams will vary in the need for team building. Four exercises are listed but you may need to use more or less than these four and you may wish to employ them over time, rather than during one team–building session. Consider using the grid on page 18 to gauge a team's need for team building and its willingness to engage in it.

Need for Team Building and Advice to the Facilitator. What is meant by saying a team has a need for team building? Teams are assembled with many factors in mind — needed skills, representation of the institutions who serve homeless people with multiple diagnoses, local politics and diversity. Once the team is composed, however, there is a need to step back and ask, "To what extent is this group of people able to engage in a candid, productive exchange of ideas about issues that will influence the work it does?"

A major consideration when creating the team is the compatibility of the team members. There is no use in putting together a team that is so burdened by conflict that it cannot function. That said, it is quite possible that a team will begin its work with some residue of past disagreements. In cases like these, the facilitator needs to be particularly skillful. The nature and pace of the team building will need to be structured in a way that is inviting, non-threatening, and designed to get past these histories.

It is likely that while some members of a team will know each, several will not. In such a case, the need for team building is not born of past problems, but from lack of familiarity. For these teams, team building tends to go smoothly and to be a real boost.

It is possible that some teams are familiar with each other and have worked on committees in the past. It may even be the case that many of the same people are on other teams concurrent with the CTTH team. In these circumstances, the need for team building is low. Some team building may be appropriate, but the facilitator should be careful not to waste the team's time when it could be more inclined to begin the task at hand.

Readiness and Willingness for Team Building and Advice to the Facilitator. The readiness and willingness of a team to engage in team building is a combination of two factors:

- the felt need for team building; and
- the perceived risk. Any number of possible scenarios can occur.

A Team That is Familiar and Comfortable with Each Other. If a team feels it does not need team building, it may be unwilling to engage in the exercises. Its hesitation may be amplified if the proposed team building is an overnight experience and would take it away from families or in some other way be an inconvenience. Members may complain, "We don't need to go through all that. We're ready to get to work. And, we certainly don't have time to go off somewhere overnight." The facilitator is well–advised to accede to their wishes, though it would still be a smart move to use the norm–setting exercise. This serves as a good reminder for such a group of what they expect from each other. It doesn't take long and all people — even those eager to get on with action planning — will see the sense in taking a few minutes to ensure everyone is on the same page with regard to how things are going to be done.

A Team That is Familiar but Uncomfortable with Each Other. This kind of team requires careful facilitation. The difficulty level can range from minor to more severe depending on how bruised the relationships are within the team. If team composition was done with care, there should be no truly broken relationships within the team. On that assumption, the facilitator is advised to start slowly and use team–building experiences that are nonthreatening and build a sense of personal connection among members. The four exercises outlined in the members' manual can be used in just this way.

Going off–site may be asking too much for such a team. It may be best to do the team building in a manner that requires only a few hours and includes lunch or dinner. The idea is that this team needs to get over any old suspicions and reconnect with each other. It is unwise to rush this process. Later, after members reconnect around the CTTH mission, they may acknowledge old business that could stand in the way of success and talk it through.

Use the grid in Figure 1 to gauge the status of the team with regard to their need and willingness for team building. Each of the figure's quadrants is explained more fully on the following page.

Figure 1: Team Building — Willingness and Need

WILLINGNESS

High	**I** Members see the need and are ready	**II** Team building is needed, but the members are hesitant.
N e e d Low	**III** Members have little need but are willing to participate	**IV** There is little need and the members are hesitant

Open/Ready Guarded/Hesitant High N E E D Low

Quadrant I. Use all four exercise and any others you deem necessary, depending on the response of the team. It needs the team building. The openness of the team would allow for longer sessions, even an overnight experience.

Quadrant II. Proceed with caution. The team is a bit fragile and will respond poorly if it feels the demands of the team building exceed its sense of comfort. It can be helpful to give the team a hand in selecting which exercises or activities it wishes to employ.

Quadrant III. The team in this quadrant is strong. Its interest in team building reflects its comfort and its interest in establishing a collaborative climate. Use the exercises but balance the focus on the team with the need to make progress on the task. This team may not need as much team building as they are willing to do.

Quadrant IV. Suggests a strong task–oriented team. Team members may derive most of the benefits of team building just by rolling up their sleeves and doing some good work together. One suggestion is to let the group work and reserve time at the end of the initial meeting(s) to reflect on its ground rules and its preferred working style. This will help the team if it has a chance to comment on what it appreciates in working together and what it wishes to prevent from happening. Another suggestion is to employ the exercises as a way of overcoming blockages the team might experience.

Using the Team–Building Exercises

The following section comes in the form of instructions. Each of the four team–building exercises in the members' manual are outlined. The format is as follows:

- Title of the exercise
- Purpose of the exercise
- Materials required

- Time required
- Instructions

Skilled facilitators usually have many types of exercises at their command. These should be used and adapted as appropriate to the CTTH process. They can be particularly valuable in problem–solving or in helping the team form a strategic plan. The four exercises below are recommended, but should not be considered the exclusive set of exercises the facilitator would use.
It is assumed that the team will be in a suitably comfortable setting where they can talk freely. It helps to have food and refreshments on hand. It is optimal if the team can do the team building and conclude by sharing a meal.

The Gifts I Bring

Purpose. This exercise has a practical purpose in addition to the immediate benefit of team building. On the practical side, the exercise asks each member to name the gifts he or she brings, some of which will have bearing on the team's future work. For example, a team may discover that one or more members have experience in community surveying or that one member has experience in writing grants. The exercise is an effective way to inventory the resources of the team.

The exercise also builds the team's sense of identity, its appreciation of individual members, and a collective sense of the team as a potentially effective agent in the community. Obviously, it helps build a sense of connectedness by helping team members come to know each other.

Materials Required. The relevant pages in the members' manual provide basic instructions and an example. It is helpful to have newsprint paper so that the team can see a full listing of the team members' gifts.

Time Required. 1 1/2 - 2 1/2 hours.

Instructions.

Step 1. Introduce the exercise by explaining to the team that they will take some time to learn about what the team's resources are and to learn a little about each other. Keep in mind that if this is the team's first meeting, more standard introductions would be in order before turning the team toward an exercise.

Step 2. Refer the team members to the pages in their Members' Manual that include the exercise, read through the instructions, spend a minute looking over the sample, and ask if anyone has questions.

Step 3. Give the team members a few minutes to list their gifts.

Step 4. Begin the debriefing by asking one member of the team to identify his or her gifts. The other members of the group should be encouraged to ask questions. For example, if a member were to say that she has written press releases in the past, it would be good to ask about the issue, the organization, and what other press-related contacts he or she has. The facilitator may need to ask some of the questions for the first team member to model how it is done. Once a team gets the idea, the questions come easily.

Step 5. Each member takes a turn sharing gifts. The facilitator needs to be mindful of time, especially when it comes to asking questions. If a lot of time is expended learning about the first few members, it may become difficult to give the latter members their due. It is suggested that a time limit be set — such as 10 minutes a person — so the facilitator can move on to the next person.

Step 6. As each person speaks, a member of the team lists the gifts on newsprint and tapes them to a wall so they can be seen. If a team member names a gift that has been previously mentioned, a simple stroke tally indicating that more than one person has named this gift is sufficient.

Step 7. After the final member of the team has shared their gifts, invite the team to take a minute in silence to reflect on all the gifts written on the newsprint. Then ask for their reactions. If in asking for reactions the team has trouble responding, you might focus the reflection by asking, "What are the strengths of this team based on the gifts we possess?" or, "Which of the gifts on this team are an unexpected strength?" or, "When you consider the range of gifts this team possesses, what opportunities for team actions come to mind?"

Step 8. Conclude by offering a brief summary of what has been said.

The Connections I Have

Purpose. This exercise, like the first one, has a dual purpose. At the content level, the exercise asks members to name the connections they have that are relevant to their work with homeless people, both within and outside the community. For example, a person may mention that he or she knows senior people in the law enforcement community, or that she has served on other committees with people from the mayor's office.

At the practical level, the exercise becomes an interesting way to learn about the team's access to other parts of the community. At the process level, this exercise invites storytelling and helps team members get to know each other. Invariably, the team as a whole also feels strengthened by the team's wide knowledge base.

Materials Required. The relevant pages in the members' manual provide basic instructions and a sample example. It is helpful to have newsprint paper so the team can see a full listing of the team members' gifts.

Time Required. 1 1/2 - 2 1/2 hours.

Instructions. The design of this exercise is similar to the first exercise on gifts. In both cases the members are asked to list information about themselves in a simple format and then share that information with others. It is the brief storytelling and the give and take among members that brings the exercise to life.

Step 1. Introduce the exercise by explaining to the team that it will take time to learn its connections and each other.

Step 2. Refer the team members to the pages in their members' manuals that include the exercise, read through the instructions, look over the sample, and ask if anyone has questions. The connections they are to list are those that may be relevant to their work as team members focusing on serving homeless people with multiple diagnoses.

Step 3. Give the team members a few minutes to list their connections.

Step 4. Begin the debriefing by asking one member of the team to identify his or her connections. As before, the other members of the group should be encouraged to ask questions. If you have already done the exercise "The Gifts I Bring," the team will have the idea. If, however, this is the first exercise, the facilitator may need to ask some of the questions for the first team member to model how it is done.

Step 5. Each member takes a turn sharing his or her connections. The facilitator needs to be mindful of time, especially when asking questions. If too much time is expended learning about the first few members, it may become difficult to give the latter members their due. It is suggested that a time limit be set, such as 10 minutes a person, that way the facilitator can move on to the next person.

Step 6. As each person speaks, a member of the team lists the gifts on newsprint and tapes them to a wall. If a team member names a connection that has been previously mentioned, a simple stroke tally indicating that more than one person has named this connection is sufficient.

Step 7. After the final member of the team has shared his or her connections, invite the team to reflect on the connections listed before them. Then ask for their reactions. If in asking for reactions the team has trouble responding, you might focus the reflection by asking, "What are the strengths of this team based on the connections we possess?"

Step 8. Conclude by offering a brief summary of what has been said.

Conditions I Value in Building a Collaboration

Purpose. This exercise is intended to establish a shared appreciation for the tone and manner with which the team will approach its work. Just as important, the process of the exercise asks team members to put into words the values they hold with regard to the work of such a group. The exercise builds the team by giving members a chance to hear that the values they value are in fact shared by others.

Materials Required. The relevant pages in the members' manual provide basic instructions.

Time Required 1/2 hour - 1 hour.

Instructions.

Step 1. Introduce the exercise by explaining the importance of beginning the CTTH process with an appreciation for each other's values when it comes to working as part of a team. Point out to them that people bring to the team their experiences of prior team efforts — for better and for worse — and that a discussion of values can be very helpful in understanding how the team will best develop.

Step 2. Ask the team members to read through the values. Invite individuals to add others they feel strongly about which are not listed.

Step 3. Have each member mark the five that are most important to them.

Step 4. One at a time, the team members identify their five choices and the thoughts behind their choices. The choices are not tallied. This is not a vote and the tallying of responses would give it that appearance. The focus of the exercise is not the endorsement of one value over others — they are all good — but the rationale the team member provides. It is in hearing each other speak about values that creates a bond. Questions or comments are fine. In fact, it is important that a team member's comments get a reaction. If, after a team member names his or her values, there is no reaction, the facilitator should ask a question or make some comment that allows the team member to expand on a point.

Ground Rules That Facilitate a Collaboration

Purpose. The purpose of this exercise is to specify the ground rules that will shape the interactions within the team. Even teams that are familiar with each other and eager to proceed with the action planning of the CTTH process should take the time to complete this exercise. Every team has ground rules and it is good practice to spend some time, even if it is just a half hour, to reassert the basics.

The assertion or re-assertion of team ground rules can help build the team by giving members a chance to signal each other about what they prefer and what they cannot abide to. It has the advantage of setting basic expectations and also gives all members of the team, especially the coordinator and facilitator, a platform for challenging the team should the ground rules be violated.

This exercise and the one that precedes it are closely related. Both address the internal workings of the team. The first focuses on the "values" that shape the climate of the team. This exercise focuses on the ground rules or behavior. In practice, the ground rules are the behavioral expression of the values.

Materials Required The relevant pages in the members' manual provide basic instructions.

Time Required 1/2 hour - 1 hour.

Instructions. If the team uses both the exercises about the collaborative climate of the team, point out the relationship between the two (see above). The instructions for this exercise are similar to the instructions used for "The Conditions I Value in Building a Collaboration."

Step 1. This exercise is almost self-explanatory. Most, if not all, members of the team will be familiar with team ground rules and the need for them. Your introduction can be very brief.

Step 2. Ask the team members to read through the ground rules. Invite individuals to add others they feel strongly about that are not listed.
Step 3. Have each member mark the five that are most important to them.

Step 4. One at a time, the team members identify their five choices and the thoughts behind their choices. The choices are not tallied for the same reasons the choices were not tallied in the previous exercise. Encourage questions and clarifications.

Step 5. As the group adopts ground rules, they should be written on newsprint.

Step 6. As a summary, review each of the ground rules and make sure the group members are clear about their commitment.

Step 7. Have a brief discussion about what should be done when there is a violation of the ground rules. Typically, the group will empower the coordinator and/or facilitator to act if the team or a team member violates a norm. However, it is an opportunity to comment on the value of shared leadership, such as that all team members are empowered to raise a concern about the team's performance should that be necessary.

Clarifying the Decision–Making Rules

One of the key ground rules for any team is how decisions are made. It is so important that it has an appendix of the members' manual devoted to it. In the section on decision–making rules, several methods are described:

- Consensus
- Majority Rule
- Minority Rule
- Self-authorized Agenda
- Autocratic Decision-making with Polling and/or Consultation
- Autocratic Decision-making by Authority Rule

Six options are included because they cover a full range of possibilities. In practice, though, most groups use a consensus form of decision-making. Some choose consensus but also authorize the coordinator to make decisions on his or her own in certain circumstances. The most important aspect of any choice the team makes is clarity.

The purpose of this section is to ensure whichever decision rule is selected is selected intentionally. In particular, if the team chooses consensus and there is an impasse, the team needs to know what is expected of each member. Similarly, if the team chooses a voting method (such as majority rule), there needs to be a clear acceptance of the disadvantages of this method, as well as the advantages. When the day comes when there is a tough decision to make, the team will need a method that was consciously selected.

First, give the team members time to read through the description of each method, along with its advantages and disadvantages. Keep in mind the adoption of a decision–making method is so critical that it requires support from each member. In effect, the decision rule governing this decision is consensus. Make sure the team understands that this is how the decision will be reached.

Next, invite an open discussion about how the team should go about decision making. And, as the discussion evolves make sure the team adequately considers both the advantages and disadvantages of the method that the team appears to be adopting. For example, if the team adopts consensus, make sure the group discusses the implications of a blocked decision.

Community Team Training on Homelessness
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Chapter 6
Action Planning

Action planning is the task of the CTTH team. The concrete product of the CTTH team is a plan and its implementation. The primary task of the team coordinator is to see to it that the team succeeds in creating a viable plan and then carries it out. This section provides a description of how you can help the team use these tools.

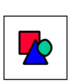
Figure 2 on the next page is an action–planning model and is explained in Chapter 4 of the members' manual. It is divided into three stages and each stage has three steps. It is built on straightforward problem–solving logic. That is, first figure out what is currently going on; second, establish shared goals; and third, determine how to proceed. Then act on the plan and monitor progress. The members' manual contains tools to help the team work together to establish a plan.

Conducting the Community Needs Analysis

The community needs analysis is conducted to provide a better understanding of the community. This has an obvious bearing on the provision of services for homeless people with multiple diagnoses. The endpoint of this process is a fact sheet about the community that the team can rely upon as it makes decisions about what it wants to focus on and how to proceed.
There may be another important use for the information the team generates. Many teams have found that the hard data needed to make the case for services for homeless people are lacking, especially those homeless people who have multiple diagnoses. The data gathered about the community can be used to better inform the community and community leaders about the needs of homeless people.

Figure 1
Model for Organizational Change

Current Scenario	Perferred Scenario	Action Planning
Story	Possibilities	Possible Objectives



Blind Spots | Goal | Best Fit

Leverage | Commitment To Outcome | Plan

Action Leading To Valued Outcomes

Step 1. *Have the team members complete the "Taking the Pulse of the Community's Resources for Homeless People" exercise and the "Political Environment Scan" exercise in the members' manual.* These instruments are intended to stimulate the team members' thinking in anticipation of the SWOT (strengths, opportunities, weaknesses, and threats) analysis. The data from the Taking the Pulse of the Community's Resources for Homeless People instrument can be compiled prior to the SWOT analysis.

Step 2. *Lead the group through a SWOT analysis of the community.* First, explain the idea of a SWOT analysis. Then explain that the process involves identifying strengths, weaknesses and threats in the community. It begins with brainstorming and then is followed by a discussion to distinguish between those ideas that are felt by the group to be facts and those ideas that are uncertain.

Do not spend time on the "Opportunities" part of the SWOT — just do S,W and T. If the team were to brainstorm opportunities, it could place the discussion into the future and for the moment the focus should be on the present. The SWOT analysis process will likely be familiar to most, if not, all members of the team. It is a simple concept and will be easily understood once it is explained. It requires newsprint and about two hours. By starting with the SWOT analysis, the team will come to realize both what it knows about the community and what it does not know. The unanswered questions that emerge from this session can guide the information gathering that is to follow.

Step 3. *Harvest the SWOT analysis*. The SWOT analysis will yield some statements of fact that the group can assert as true either by virtue of their experience or because they have supporting data. The SWOT analysis will also yield a set of questions. These questions are the object of subsequent information gathering.

Step 4. *Determine what additional information gathering is required and select the means by which to acquire it.* After the team has identified which questions they need to answer, they should identify the means by which they will find the necessary information.
The members' manual includes the following resources (Figure 3 gives a brief overview of the functions of these resources):

- Resources That Can Help the Team Gauge the Community's Risk Level
- Guide to Finding Statistics

- Community Composition Summary
- Taking the Pulse of the Community's Resources for Homeless People
- One–on–One Interview
- Political Environment Scan

Step 5. *The work to be done is divided and the who-does-what-and-by-when is recorded in the team minutes.* Going out and gathering information about the community is likely to be the team’s first task. Consequently, it is the team’s first opportunity to work together, depend on one another, and to succeed at something. It is both important as a task and it is important to the team's sense of itself as a real team. For these reasons the coordinator and facilitator should take special care with this first division of labor. Make sure each team member has a part to play.

Make sure the tasks are achievable and that time lines are realistic. A great deal of information may already exist. Many teams in the past have been able to do their research about the community by collecting and using existing information. For example, the city or county may have many statistics on how services have been used in the past; hospitals and shelters will have information on the people they have served; and previous efforts to get grants or other funding may have produced valuable information. The process of applying for HUD homeless assistance through the Continuum of Care process may be an excellent source of information for the community needs analysis.

Step 6. *Develop a fact sheet reflecting the SWOT analysis. The fact sheets have two purposes.* First, they help the team achieve a shared understanding of the challenges and opportunities they face. Second, the fact sheets can be shared with others to help convince them of the need and urgency for effective and efficient services for homeless people with multiple diagnoses. In the past, when teams have needed to persuade local leaders that a need exists or that services can be effective, an important first step was the creation of authoritative and credible fact–finding about the community.

Figure 3
Overview of CTTH Resources

Tool	Comment
Resources That Can help the Team Gauge the Community's Risk Level	This list is intended to prompt the team into thinking of sources can help in your particular setting.
Guide to Finding Statistics	These sources may provide information that can help place local data in context.
Community Composition Summary	This can be used as a template. The team can add, delete, or modify items as they see fit.
Taking the Pulse of the Community's Resources for Homeless People	This instrument is primarily intended for the use of the team as a way to capture perspectives on the present situation. It could be given to others as well.
Interview Political Environment Scan	A template for gathering the perspectives of key individuals in the community.

	This instrument is for the internal use of the team. It highlights the people in the community who need to be kept in mind as the process goes forward.

Teams have varied greatly in the amount of time and energy they have needed to put into the community needs analysis. Several factors can cause this:

- If the team is uncertain or in disagreement about the needs in the community and/or existing services, it is wise to undertake a thorough fact–gathering process.
- If the team needs to persuade local leaders about the needs of the homeless people with multiple diagnoses and/or the effectiveness of existing services, it is wise to be thorough.
- If, on the other hand, the team is well informed and is in general agreement about the community, the fact gathering needn't be as thorough and the team can proceed with action planning.
- If local leaders are well informed and open to addressing the needs of the homeless people, the fact-finding need not be as thorough.

A sample of the kind of information a fact sheet might contain is in the members' manual. It contains information common to five teams. The creation of a fact sheet for a particular city or county could be much more specific.

Identifying Leverage Issues

This step in the process is quite important. It involves choosing which challenges/opportunities among the many identified in the community needs analysis the team should initially address.

Step 1. Explain the need to narrow the team's focus and explain the process of identifying leverage issues. This should not be a hard sell, as people on the team will be experienced enough to realize that if they try to do everything at once they will fail and exhaust themselves in the effort. The idea of "leverage" may need to be explained. "Leverage," as the term is used here, refers to the ability to get the maximum effect from the available resources. In this case it means getting the greatest improvement in services to homeless people using the valuable but limited resources of the team. A few may be so excited about the possibility of taking long–overdue action that they may try to take on more than the team can handle. Do not let this happen.

Read through this process and explain it to the team before you begin. Make sure team members understand how the multi–vote process works.

Step 2. Have the team list the issues that the team could chose to focus upon. The members' manual contains some examples.

Step 3. Review the ways an issue can have leverage. The member's manual contains an explanation of how an issue might have leverage, but here is a bit more information on the types of leverage that are associated with the issues a team takes on.

High Profile or Big Ticket. This is an issue that, if dealt with successfully, will yield a major boost. The upside is significant but often there is the possibility of failure. It is a high risk/high payoff stance. The historical example most often used is President John F. Kennedy's challenge to land a man on the moon. Teams that choose issues of this nature are hoping to energize themselves with a grand undertaking. Recall the Chicago architect Daniel Burnham's famous quote, "Make no small plans. They have no power to stir men's (or women's) souls."

Quick Results. This refers to projects that are usually smaller in scope but are waiting to be done. They yield a quick win and a boost to morale. Teams with shaky confidence and/or teams who need to see they can get things done might choose such a project.

Spread Effect. This occurs when one problem is being addressed, but meanwhile other problems are either solved or avoided. In essence it is reflected in the common saying, "killing two birds with one stone." In more contemporary terms it is the logic of prevention. A team that sees an issue that could not only provide immediate help but also lessen problems in the future would be seeking to take advantage of the spread effect.

Visibility. This refers to the value of taking on a project that will capture the attention of others. It is broadly political in nature. For example, a team that establishes itself in a new area might do something to demonstrate to others in the community that they intend to be a "good neighbor." Some projects that at first glance have only cosmetic value might on a second look be seen as having great value for the visibility they generate.

Urgency. This refers to the will to act. A project of lesser importance may be selected simply because everyone, or nearly everyone, is ready to act on it. Often such issues are not critical to the mission, but are bothersome and issues that most members will be glad to resolve.
An issue may achieve multiple types of leverage as described above. The important point is to be strategic in the team's choices.

Step 4. *Open the discussion about the potential leverage of each issue.* Each issue is discussed and its potential is measured against the five types of leverage.

Step 5. *The team "votes" as a step in building consensus - the multi–vote technique.* Each member of the team is allotted a number of votes equal to one–third the number of issues. If there are 15 issues, each member casts five votes. Round up if the number is not a multiple of three. For example, if there are eight issues, each member gets three votes. The issues are numbered and the votes of the members are recorded as tally strokes. One vote per issue and members are not allowed to cast more than one vote for an issue.

If after the first ballot, a top three are not clear (this is often the case) a second ballot can be held. In order to do this, those issues that failed to get votes or that got only one vote are eliminated. The remaining issues are submitted to another vote, the same one–third rule applies to the number of votes for each member, and the results are tallied the same way. This can be continued until the team has decided on a clear set of top issues.

You may wish to consider the first ballot non–binding. Sometimes when the team sees where the votes fall, it wishes to engage in more discussion. If such is the case, hold a second vote and the results of that ballot can be final.

Step 6. *Check for consensus.* This includes voting, which should be measured by majority rule or another consensus method. The voting process can be viewed as a time–efficient way to discern the will of the group. The last step in the process brings it back to consensus. By asking if all members are supportive of the results of the multi–vote process, each member's individual commitment is solicited. If everyone is agreed, you have consensus. If not, you can continue talking.

Setting Goals, Outcomes and Objectives

Setting goals, outcomes and objectives is the heart of the action–planning process. Everything that has happened up to this point — the data gathering and choosing leverage issues — builds toward this part of the process and everything that follows — making the action plan itself and following up on the plan — flows from it.

Action-Planning Jargon

If the jargon were put aside and the action-planning process were described in normal language, the words would sound something like this:

Story	Find out what's going on in your community
Blind Spots	Make sure your understanding of what's going on in the community is accurate and complete.
Leverage	Of all the things you could act on, what is the best place(s) for your team to start.
Goals	What you hope to accomplish - the end state.
Outcomes	Specific measurable achievements that measure progress toward the goal and that, when added together, equal the goal.
Objectives	The actions needed to achieve the outcomes.
Action Plan	The "who-does-what-and-by-when" that guide team and individual efforts.

Step 1. *Make sure the team has a good grasp of the goal–setting process.* Start by creating a jargon-free translation of the process. Then have the team read and discuss the examples in the members' manual. The example is clear and imitating its style in terms of specificity and succinctness is a sound approach.

Step 2. *Translate the leverage issues from problem language into positive, goal language.* The section in the members' manual labeled "Identifying Leverage Issues" (page 26) contains an example of how to move an issue from problem language into goal language.
Keep in mind that the goals and outcomes must be about homeless people with multiple diagnoses. Numerous objectives may involve meeting with officials and dealing with ordinances,

but such actions take on meaning only when they are linked to some valued accomplishment for the multiply diagnosed. The example on page 37, “A Set of Goals and Objectives Developed in Wichita,” makes this clear. It is a good model for the team.

Step 3. *Construct a set of outcomes for each goal.* Using the Wichita example helps to explain the difference between a goal and an outcome measured at the consumer level. Using the Wichita example, you can immediately see a big difference between a goal and a consumer outcome. The goal is the overarching direction and accomplishment. As such it can be stated in global terms. Consumer outcomes are specific, measurable or verifiable, achievable, and time specific. For this reason it is often tougher to nail down the outcomes than it is to agree on the goal.
Because consumer outcomes are so specific, setting a baseline and an amount of desired change can require data that may not be available at your meeting. It is suggested that the team work out the language of the outcome and agree to establish the specific measures after additional information is collected. That task then becomes a team member’s between meeting assignment.

Step 4. *Generate a set of objectives for each goal*. Again, the example in the members’ manual is your best teaching tool. Begin by brainstorming for options, especially if the goal has been tried before. If past efforts fell short, there is reason to think that the same objectives will lead to a similar result. The team should therefore be invited to “think outside the box” to come up with objectives with more potential.

Converting Objectives Into an Action Plan

The actual mechanics of creating an action plan are rather simple. The sample in the members’ manual is clear in describing the categories and what kind of information goes in them. Have the team members study it and answer questions.

Often teams will benefit from creating the action plan together. In order to do this, the team needs an oversized version of the template. A few sheets of newsprint taped on a wall will work, or a white board or black board, also can be used. The idea is to create a situation where the whole team can see the plan take shape. Later you will want to transcribe the action plan into a computer. You may find it helpful to use the table function in a word processing program to help you create the template. Start with the goal stated at the top. Then enter the objectives. Have the group suggest start dates and review dates.

The most critical part of the process is the “person responsible.” One person should be responsible for this process or any other action–planning activity. Do not record “the team” to get something done. Do not even record two people’s names. Any number of people can be involved in the objective, but it is best if one person assumes responsibility. In fact, the person responsible may not actually do anything per se, but will see that the objective is achieved.

The action plan becomes the team’s road map. It is the focus of future team meetings. In fact, you could say that the action plan will make up the central part of the agenda for subsequent team meetings. That is, it is the touchstone for the questions, “What have we accomplished since our last meeting?” and “What must we do between now and our next meeting?”

Avoiding Pitfalls

Teams consist of people who bring their strengths and their weaknesses. Planning is an inexact science. Solving complex service delivery problems for homeless people with multiple diagnoses is complicated business. When you put all this together, it is not surprising that a section on the "shadow side" is included in the members' manual.

The information included in the section on the shadow side is not a collection of all the possible things that can go wrong in team action planning. But, rather, it is a listing of the problems that have surfaced with previous teams as they have gone about the task of putting together an action plan.

One way for the team coordinator to try to avoid planning problems is to name pitfalls at the beginning of an experience and engage the group in a discussion of how senseless it would be to fall into such practices. Once the group is introduced to potential pitfalls in this way, it is less likely they would slip into the problem. To do this, the team coordinator would direct the team early in its first few meetings to review the shadow side concerns. The discussion can be launched by asking if members of the team have ever encountered these kinds of problems. Invariably, members have experienced the shadow side and the stories are sometimes amusing. Implicit in all this is the notion that this team will not fall prey to the shadow side and if they do, they will quickly recover.

Another option is to read and discuss as needed. This use of the shadow side information has the team coordinator referring the team to the part of the shadow side they are dealing with as the action-planning process unfolds. For example, at the outset, the team would discuss the shadow side of stage one. Later, as the team takes up goal setting, the section on stage two would be reviewed.

Both approaches have been used and both have worked. The more frequently used of the two is the first technique and those groups that have used it included it in their early team–building process.

Numerous Promises

Communities have consistently found that homeless people with complex health and social problems can be the most difficult to engage. The CTTH process recognizes the contributions that fragmented local systems make to this engagement difficulty. If the process can be successfully implemented, the promises are numerous — to the consumer, to the staff of the organizations, and to the quality of life in the communities they serve.